



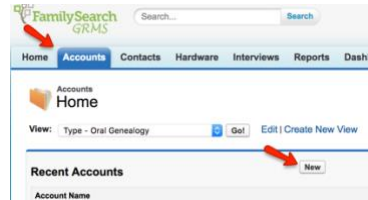
Africa Oral Genealogies & Family Histories Project

Creating and Maintaining Contractor Accounts and Contacts in GRMS

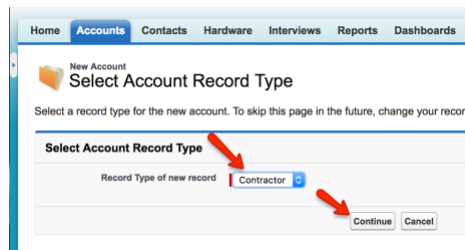
Account and Contact management is the process of managing our contractors and the people working for those contractors.

Creating Accounts – The Account Manager (Operations Manager) creates an account record for each prospective Contractor.

1. Go to the “Accounts” tab in GRMS and click **New**.



2. Select “Contractor” from the dropdown for “Record Type of new record.” Click **Continue**.



3. Create a Contractor ID for that Account using the 2-letter country code and 2-letter number in chronological order as new contractors are entered. (Example: GH01) The fields marked with a red bar must be filled before saving for the first time. Make sure that the status is “Under Evaluation” to begin.

A screenshot of the 'New Account' form in the GRMS web application. The form is divided into several sections: 'General Information', 'Legal and Finance Info', and 'Address Information'. Red arrows point to specific fields: 'Contractor ID', 'Account Name', 'Status' (set to 'Under Evaluation'), 'Email', 'Phone', 'Website', 'Legal Entity Type', 'Location of Incorporation', 'Pay Rate', 'Billing Country', 'Billing Street', 'Billing City/District', 'Billing State/Province', 'Billing Zip/Postal Code', 'Shipping Country', 'Shipping Street', 'Shipping City/District', 'Shipping State/Province', and 'Shipping Zip/Postal Code'. A red bar is visible next to the 'Contractor ID' field, indicating it is a required field.

4. NOTE: Required fields include; Account Name, Pay Rate, Legal Entity Type, Location, Phone, Status, and all billing and shipping information. Enter this information as quickly as possible.

5. Enter the Billing and Shipping addresses correctly, according to the field.
 - a. Only add the street address in the "Street" field. Only add the city in the "City" field.
 - b. Select the State/Province from the dropdown list. If the State/Province is not in the dropdown list, ask Salt Lake to add it.

The screenshot shows a form titled "Address Information" with a link "Copy Billing Address to Shipping Address". It contains two columns of fields for Billing and Shipping information. Red boxes highlight the following fields: Billing Street, Billing City/District, Billing State/Province, Billing Zip/Postal Code, Shipping Street, Shipping City/District, Shipping State/Province, and Shipping Zip/Postal Code. The Billing Country is set to "United States" and the Shipping Country is also set to "United States".

6. After the Contractor has completed all the required steps, change the status to "Active."

Creating Contact Records – The Account Manager also creates a contact record for each Principle and Supervisor associated with the Contractor. (These are not the interviewers that the contractor will hire, but the actual contractor and anyone else at the company who the account manager deems necessary to receive information.)

1. From the Account page, select the Account you need to add a Contact to. It is important to add the Contact from the **Account** page. Scroll to the "Contacts" section. Click on **New Contact**. (This will automatically move you to the "Contacts" tab.)

The screenshot shows the "Contacts" section of the Account Manager interface. A red arrow points to the "New Contact" button, and another red arrow points to the "Contacts" tab. The interface includes a table with columns: Action, Contact Name, Title, Role, Mailing City, Mailing State/Province, Email, Phone, and Mobile. A "Contacts Help" link is visible in the top right corner.

2. Select "Contractor" for the "Record Type of new record." Click **Continue**.

The screenshot shows the "Select Contact Record Type" form. A red arrow points to the "Record Type of new record" dropdown menu, which is set to "Contractor". Another red arrow points to the "Continue" button. The form also includes a "Cancel" button and a "Help for this Page" link.

3. Enter the Contact's information in every field. Verify that the "Account Name" listed is correct. Enter the appropriate role from the dropdown list; either "Principal" or "Supervisor." Click **Save**.

The screenshot shows the "New Contact" form. Red arrows point to the "Role" dropdown menu, which is set to "Principal", and the "Account Name" field, which is set to "Worldbiz - Ghana". The form includes fields for Salutation, First Name, Middle Name, Last Name, Email, and Phone. A "Save" button is visible at the top. A note at the bottom states: "Contacts not associated with accounts are private and cannot be viewed by other users or included in reports."